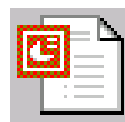
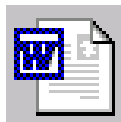




Electronic Packets



ELECTRONIC PACKETS – INSTRUCTION MANUAL

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What is an electronic packet?

The electronic packet consists of the majority of the documents in the paper version of the hearing packet: agendas, minutes and staff reports. We exclude memos to the Commissioners (especially the one that says dinner will be served) and most attachments with more than 10 pages. Most documents should be in some type of electronic format already (Word, PowerPoint, etc), as most of the documents are internally created or stored in CDS; there will be some documents, such as site plans, that will need to be scanned. All documents are then compiled or converted into PDF format and posted to the web.

1. CDS Documents to be converted:

- Agendas (Final, Study Session and Tentative)
- Minutes to be approved at that hearing
- Reports & Stips
- All other attachments saved into the Case Folder (Graphics, Traffic Impact, etc)

2. Documents to be scanned:

- Signature page of report
- Applicant's Narrative (if not provided electronically)
- Site Plans & other 11x17s
- Any other applicant provided attachments

3. Documents replaced with "on file" page

- Any attachment that is greater than 10 pages unless deemed necessary for the readers understanding of the case

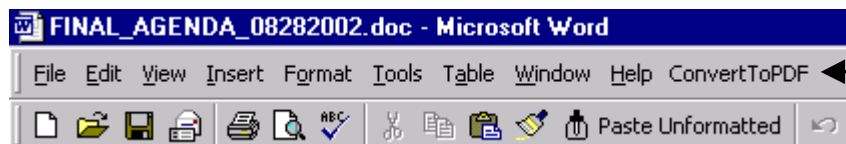
4. Documents excluded

- Memo to Commissioners stating when hearing starts and when dinner served
- Any other internal memo from Staff to Commissioners

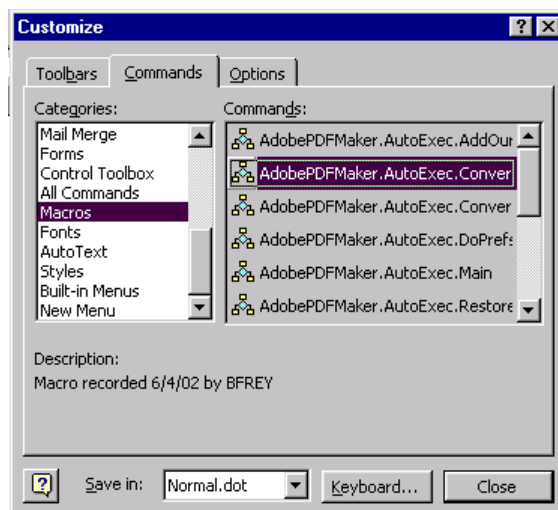
What do I need to start?

1. Full version of Adobe Acrobat – see your Technology Coordinator if you don't have it
2. Paper Capture Plug-in (Free Download from Adobe web site)
3. Conversion Macro on Toolbar for CDS conversions

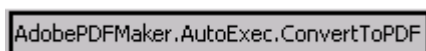
*****To convert a CDS document to PDF you will have to have the Macro manually placed upon your menu bar. It should appear as show below. If you don't have the Macro on you Menu bar, you'll need to add it:***



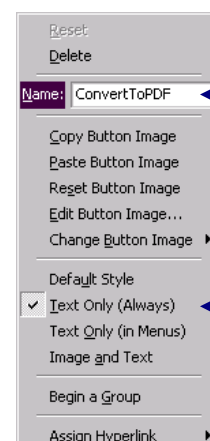
- A. Right-click on the toolbar, and select "Customize."
- B. Go to the Commands tab, and in the Category, select Macros.



- C. On the right side of the pop-up, select the second Adobe macro. This will be the ConvertToPDF macro.
- D. Drag the macro to the Menu bar, which will look like this:



- E. Right-click on the Macro and rename it to just say: ConvertToPDF.



How do I create an electronic packet?

There are 5 main stages to preparing Electronic Packets:

- I. PREPARING DOCUMENTS FOR CONVERSION**
- II. CONVERTING TO PDF**
- III. INSERTING ATTACHMENTS**
- IV. SETTING THE BOOKMARKS, LINKS, AND DOCUMENT PROPERTIES**
- V. PREPARING FOR WEB POSTING**

The instructions below are presented in this order. It is very important to follow these steps when creating your packet, or you will run into problems (broken links or not properly optimizing for web viewing, etc).

I. PREPARING DOCUMENTS FOR CONVERSION / CREATING ACCESSIBLE DOCUMENTS.

- *Until Accessibility becomes a priority, steps 1, 4 & 5 of this stage will often be skipped for the sake of saving time. Please keep in mind, however, that most of these steps are critical for screen readers to be able to process the final product, and as such should be considered a normal practice in the creation of electronic packets. **DO NOT SKIP STEPS TWO & THREE.***

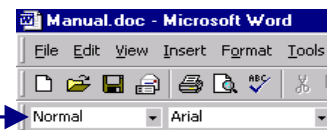
1. Check all reports for Headers 1 & 2 (Automates Bookmarks)

A. The PC/CC reports have been automatically set up for headers 1&2 (using the style sheets) beginning with any report created after 12-4-02.

B. For reports created prior to that date, please check that the section headers are showing as Header 1 and the attachments listing shows as Header 2.

i. To change the style applied to text, select the text (only that which pertains!)

ii. Go to the Style box in the toolbars and select the appropriate style to be applied



C. If you need to change the font style, make sure that you make the change in the style sheet (PC/CC Settings are shown below, other report types will vary in their font settings):

i. Select "Format" from the Menu Bar, click on "Style..."

ii. In the Styles listing in the left column, click on Heading 1, then click on the "Modify" button

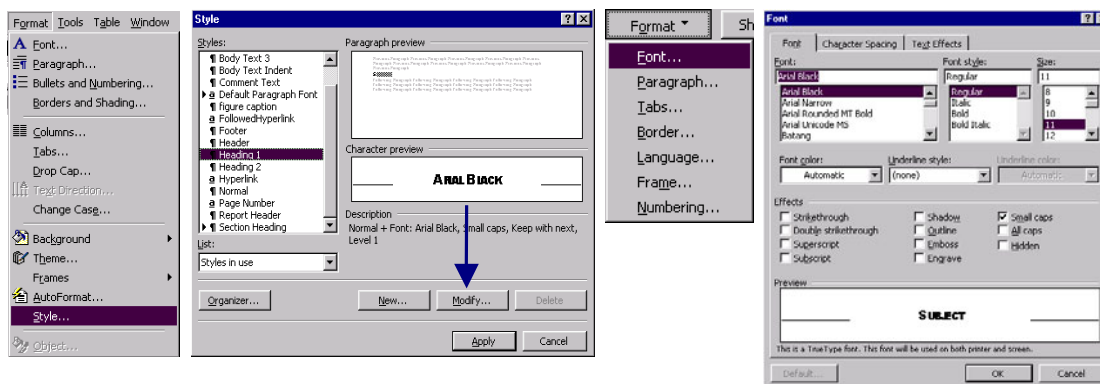
iii. Click on Format, then select Font from the drop-down list

iv. Change the Font to *Arial Black, Regular, Size 11, Small Caps*; Select OK

v. Modify Paragraph to make sure that "Keep with Next" is NOT checked

vi. Then click on OK & OK again, then Apply

vii. Repeat for Heading 2, using *Times New Roman, Regular, Size 11 font settings*

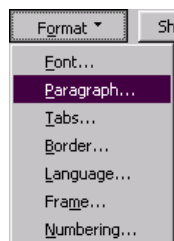


STEPS: i

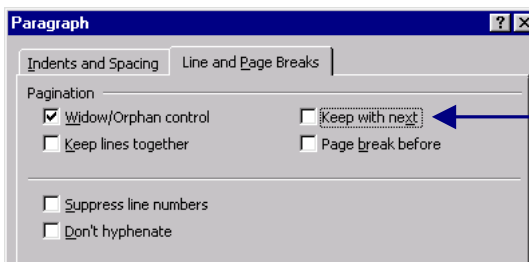
ii

iii

iv



v



2. De-colorize the stips and additional information attachments.

- A. **PLEASE NOTE:** Open the CDS version of the document and save into the electronic packets folder so that you are not modifying the original CDS document.
- B. Select All, and choose Black font coloring - SAVE

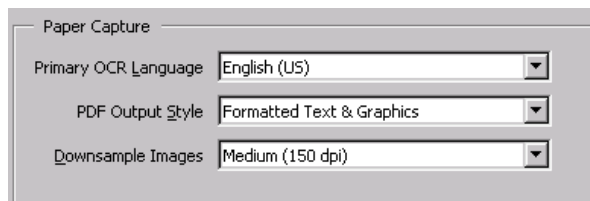
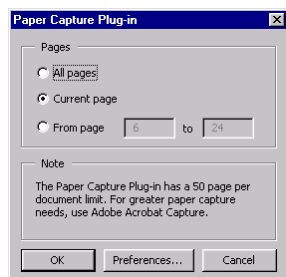
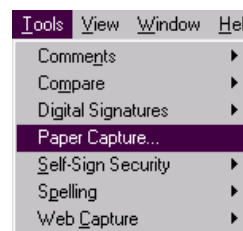
3. Scan the signature pages of the reports & all remaining (non-electronic) attachments.

- A. Flag the pages in the reports that will require scanning
- B. Scan the attachments one report at a time:
- Open **HP Precisionscan Pro** (from desktop)
 - Place first document (usually signature page of report) in the automatic document feeder (ADF) tray
 - A window will automatically pop up (ADF Scan window),
 - Click on "Scan"
 - Browse to the electronic packet folder (For Current Planning, the EP folder is in the CoordSpec workgroups folder)
 - Select the appropriate hearing date folder, or create one if their isn't one already
 - Title the document by the case number (i.e. 26-UP-02_scans.pdf)
 - The document will then scan and save
 - When the scan is complete, a pop-up window will ask you if you want to add more pages to the document,
 - If there are additional attachments to be scanned for that case report, click set the next attachment on the ADF and click on scan; repeat until all attachments are added to the pdf
 - If there are no additional attachments needing to be scanned for this case, click on "done"
 - Repeat scanning for each case until completed

4. Run the Paper Capture plug-in on the scanned documents (for accessibility) .

- ***This program takes a while to run, depending on the number of pages, amount of text vs graphics, etc.*** If you want to speed up the process of creating the packets, you can either skip this step or only use page capture on critical pages (step D would change to "Current Page" and you'd have to run it manually on each page you want to capture or "From Page ___ to ___" to run a series.

- A. Open PDF file
- B. Click on "Tools" in the Menu Bar
- C. Select "Paper Capture"
- D. Make sure that the "All Pages" option is not checked – do either one page at a time or a series of pages. Using the All setting isn't necessary for most cases, and can take a while to process.

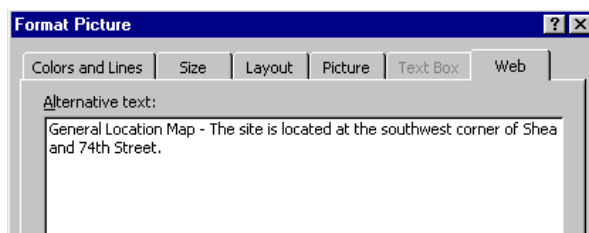
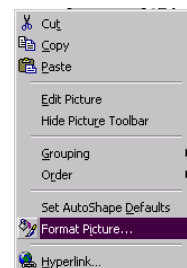


- E. Click on "Preferences"
- F. Select "Paper Capture" in the left column
- G. Set the preferences to: English (US), Formatted Text & Graphics, and set the Downsampling to Medium (150 dpi).
- H. Click on OK, the OK again – this will run the program
- I. Repeat for each PDF file created from scanned images

5. Insert alternate text for images

A. Add alternate text to graphic elements in Word documents

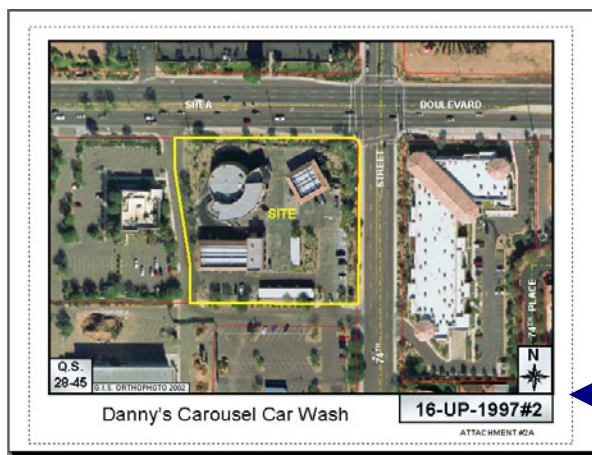
- i. Open the case reports and make sure that the map insert has alternate text
 - (1.) Open the Case Report
 - (2.) Right-click on the map insert
 - (3.) Select Format Picture
 - (4.) Click on the "Web" tab
 - (5.) Add alternate text – for example: "General Location Map – This site is located at the southeast corner of Scottsdale and Indian School Roads."



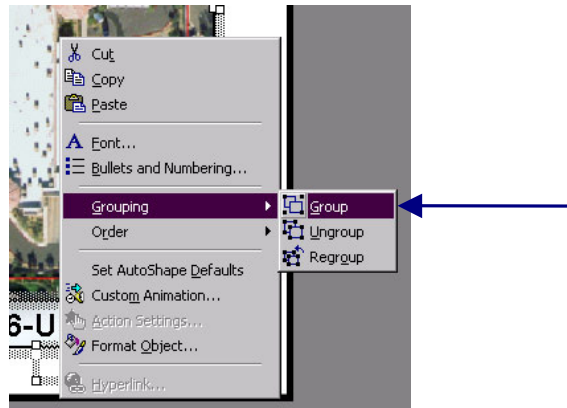
- (6.) Do the same for the Scottsdale Seal
- ii. If there are other graphic elements in the report or other Word documents saved in the case folder, repeat this process on each element.

B. Add alternate text to PowerPoint graphics

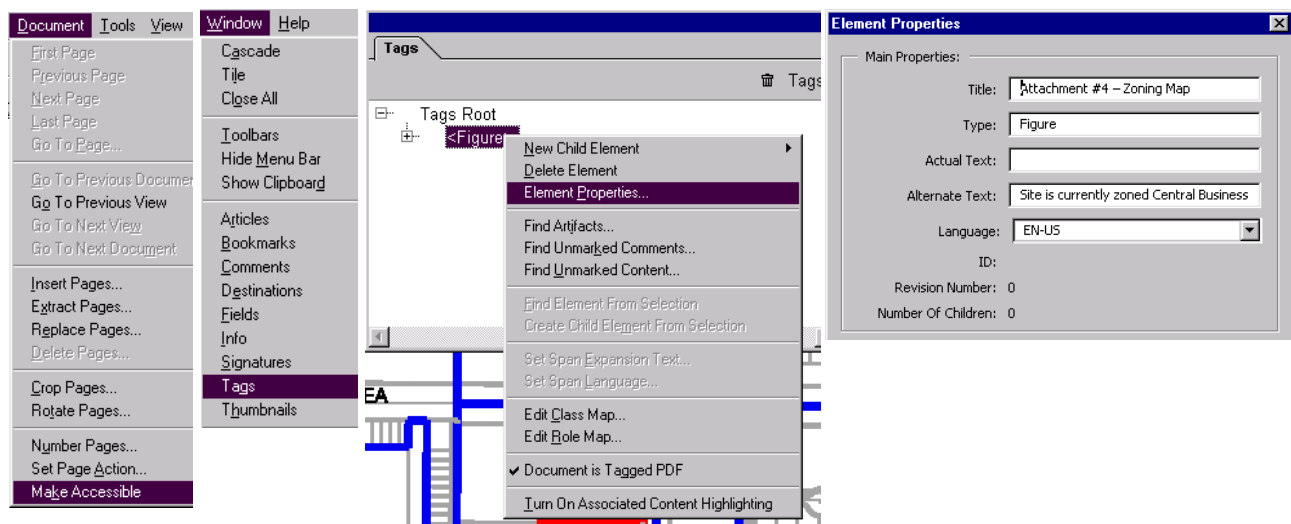
- i. Open the file and select the entire graphic image



- ii. Right-click and select Grouping... the click on "Group"



- iii. Right-click on the aerial and select Format Object
- iv. Click on the “Web” tab
- v. Add alternate text – for example: “Attachment #2 – Context Aerial showing relationship to neighborhood.”
- vi. Repeat with all PowerPoint Graphics
- C. **Add Alternate Text to PDF zoning graphics** (or any other existing PDF)
 - i. Open the File
 - ii. Click on Document in the Menu Bar and select “Make Accessible”
 - iii. Click on Window in the Menu Bar and select “Tags” -- A window pops up with the newly created tags listed.
 - iv. Right-click on tag and select “Element Properties”
 - v. Name the tag – i.e. “Attachment #4 – Zoning Map”
 - vi. Add alternate text – for example: “Site currently has Open Space (O-S) zoning.”



II. CONVERT EVERYTHING IN ELECTRONIC FORMAT INTO A PDF DOCUMENT – **YOU CAN ONLY DO THIS IF YOU HAVE THE FULL VERSION OF ADOBE ACROBAT!**

1. Convert Agendas & Minutes to PDF

- A. Open CDS Meetings to the hearing date in question and/or the electronic packets folder.
- B. Convert all agendas to PDF. (Don't forget the tentative agenda for next hearing.) Rename using ddmmyyag.pdf format –i.e. 121102ag.pdf.
 - i. To convert CDS documents, click on the “ConvertToPDF” macro on your Menu bar. If you don't have this, see the relevant text in the above section on “What do I need to start?”
- C. Save the PDFs into the Electronic Packets folder.



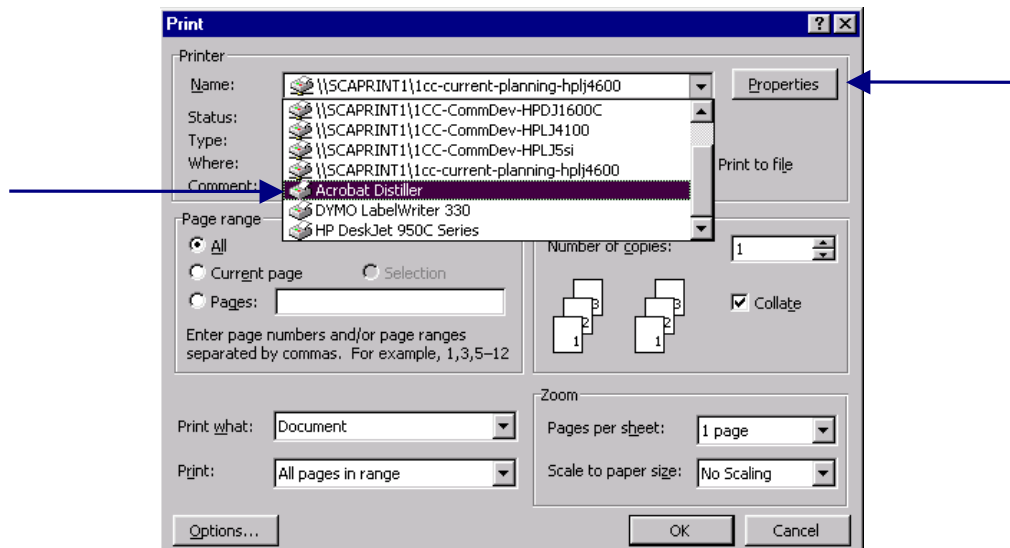
2. Convert all reports, stips and attachments that are in CDS to PDF format. Save the PDFs into the Electronic Packets folder. *Use the following naming conventions to help the reports and attachments be grouped by case name and by attachment number.*

- A. Start with the PC report and stips in the document window.
 - i. To convert non-CDS documents in Office, just click on the conversion button or use Distiller as described below (See Subsection 2.D).
 - ii. Save them like casename.pdf. *For example: 12up02.pdf or 11zn97-2_#05.pdf*

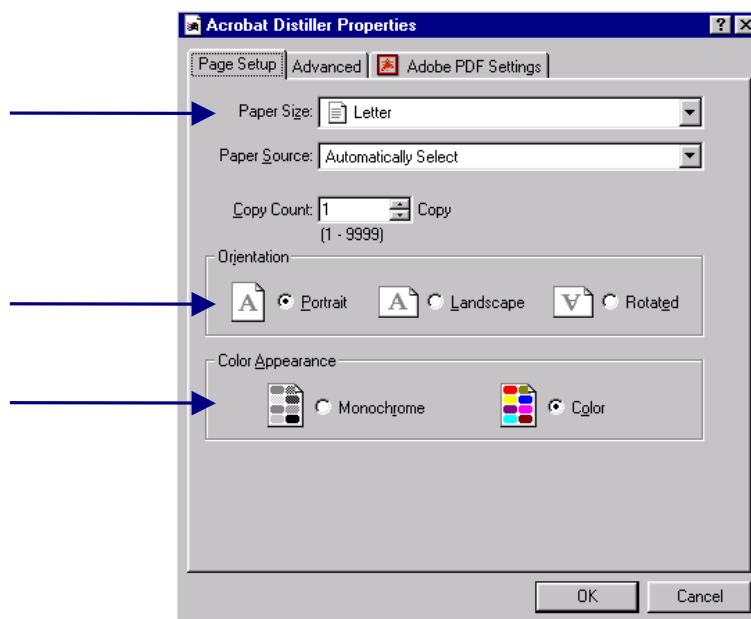


Please Note: Do not save the report name with the # sign – when the file is posted on-line the web server thinks you're looking for a bookmark within a document and won't find your file! (If your case name is 2-UP-2000#2 and you save it that way, the program will look for a bookmark named “2” in a file named “2-UP-2000”.)

- B. Open the Case Folder and convert the PowerPoint graphics that Josh made (aerials and GP map). Save as casename_#.pdf.
 - i. *For example: 12up02_#02A.pdf or 11zn97-2_#12.pdf*
 - ii. Open the Zoning map(s). Since they are already in PDF format, just do a quick Save-As into the electronic packet folder. Remember to name them as shown in the above example (Sec. 2.B.i.)
- C. If there are any other attachments in electronic format, such as the Traffic Impact Statement, or any specially made attachments, convert them to PDFs as well.
- D. For other file types, i.e. non-Microsoft Office files, print **using Acrobat Distiller**.
 - **You can also use these settings to convert larger files (Word, PowerPoint, etc) to keep the size down, as the conversion process below also compresses images, etc.**
 - i. To use the Acrobat Distiller, Go To “File” and select “Print”
 - ii. Select Acrobat Distiller as your print output source (instead of a printer)
 - iii. Select “Properties”

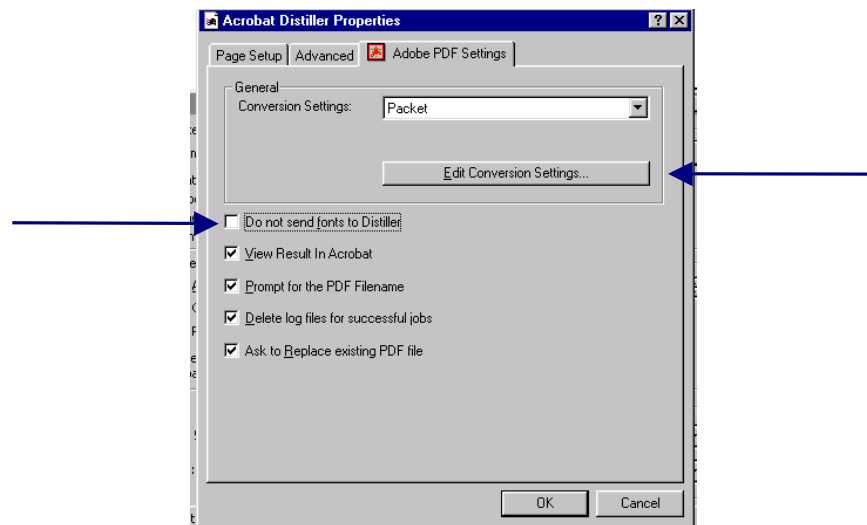


iv. Verify the Page Setup (page size, orientation, and color or b&w)

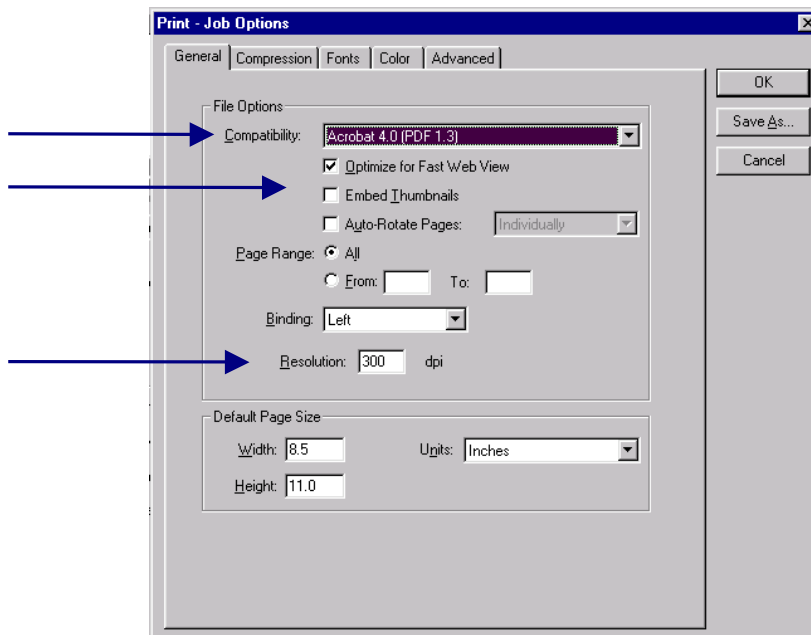


v. Select the PDF Settings tab

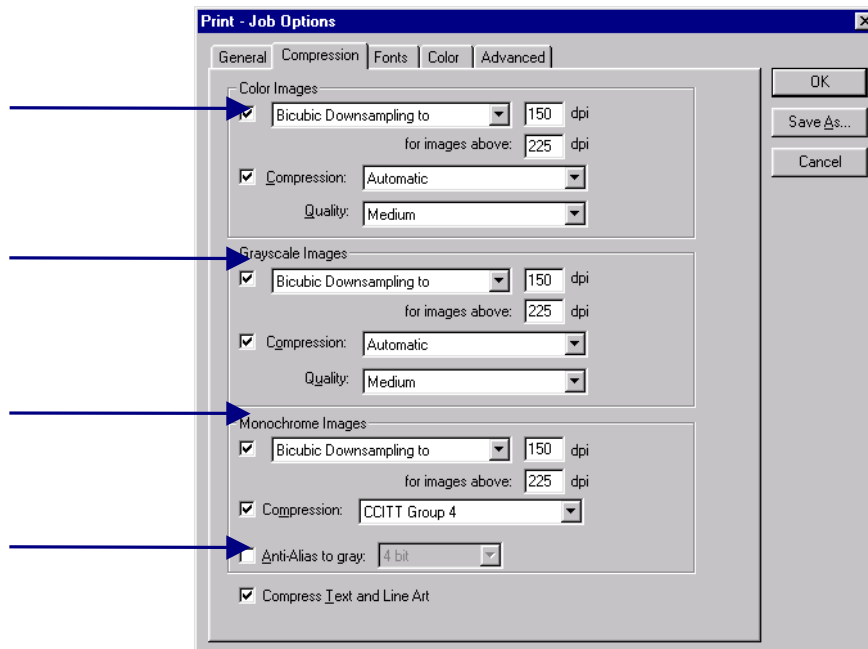
- (1.) Check all boxes **except** the one labeled “Do Not Send Fonts to Distiller” – this is the only box that should be left **UNCHECKED**.



- (2.) **The first time you use the Distiller, you will have to set the conversion settings.** After the first time, just select "Packet."
- (i) From the dropdown list, select "Print"
 - (ii) Select "Edit Conversion Settings" – this will pop up the job options window
 - (iii) In the "General" tab, set the compatibility to version 4.0, make sure the "embed thumbnails" option is NOT selected, and change the resolution to 300 dpi

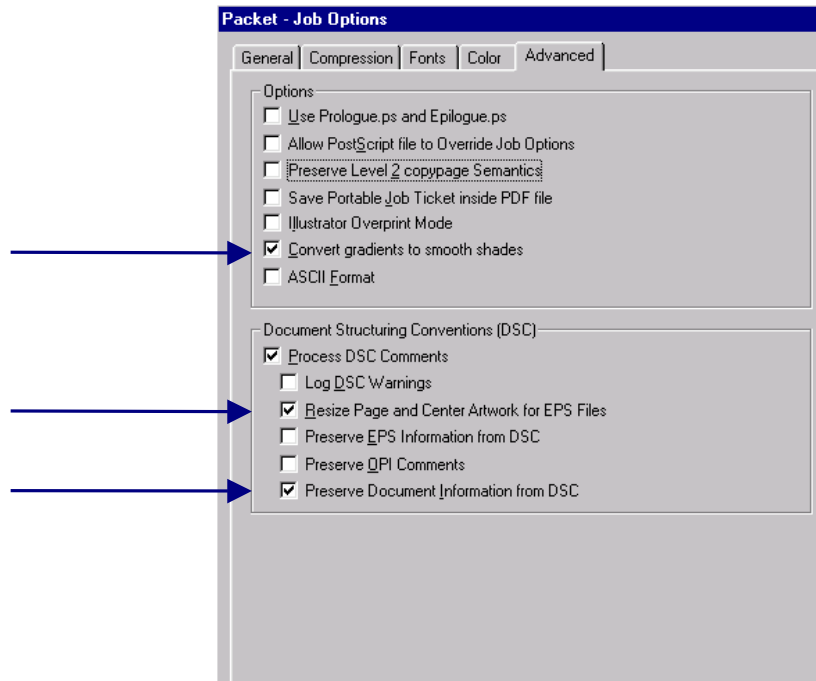


- (iv) In the "Compression" tab, set the compression for all image types to 150 dpi

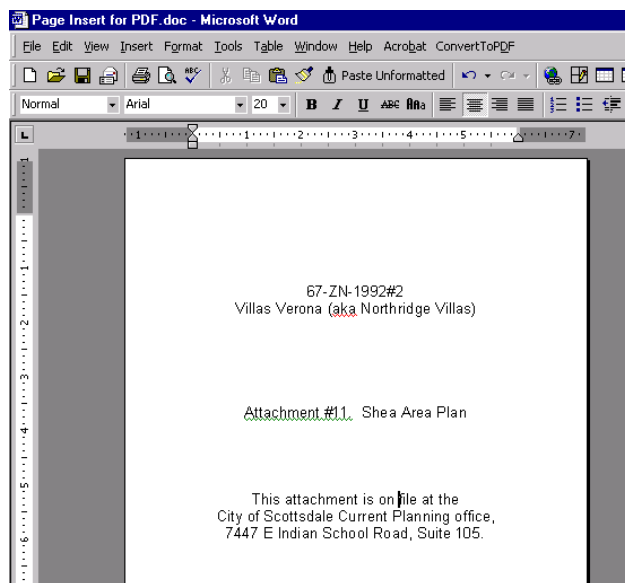


(v) In the “Advanced” tab, make sure that only the following options are checked:

- Convert gradients to smooth shades
- Resize page and center artwork for EPS files
- Preserve document information from DSC

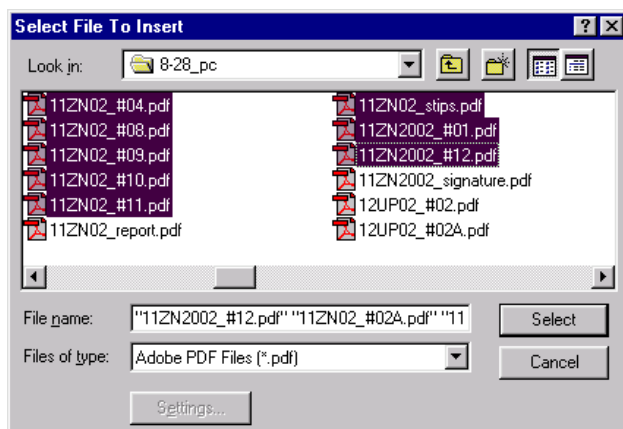


3. Create a page “blank” for those report attachments that are too large to scan in. (The usual rule is that +10 pages is too large unless it's vital to the readers understanding of the case.)
 - A. Go to the Electronic Packets\Instructions folder and open the document entitled: PageInsert.doc
 - B. Edit for the appropriate case number, name and attachment information
 - C. Save
 - D. Convert to PDF and name the attachment as described above.

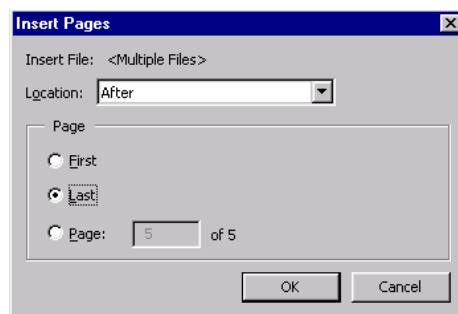


III. INSERT ALL THE ATTACHMENTS INTO THE REPORTS.

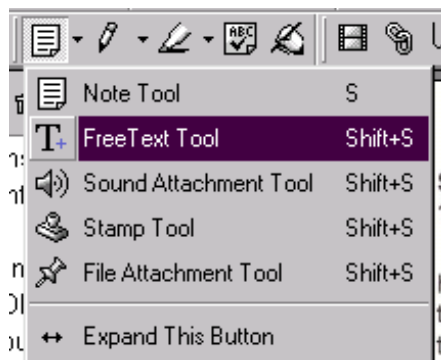
1. Import the attachments into the report PDF. **Save frequently!**
 - A. Select Document, Insert Pages.
 - B. Select all the attachments at once by using the control key.



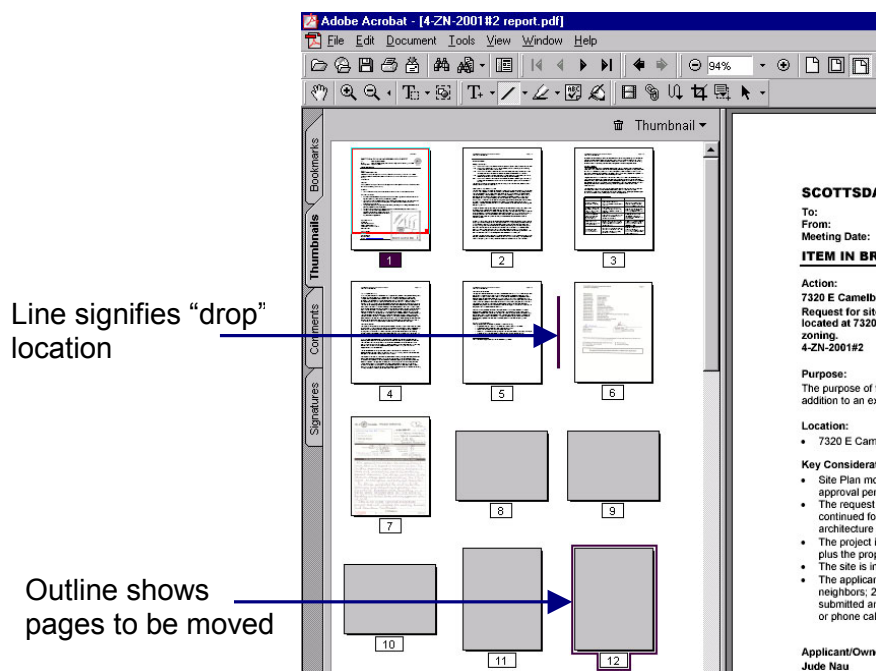
- C. Tell the program to insert the attachments **after the last page in the report.**



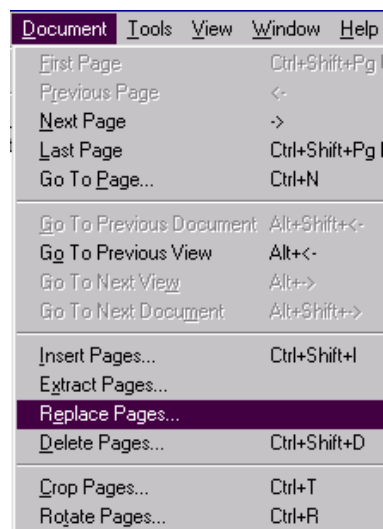
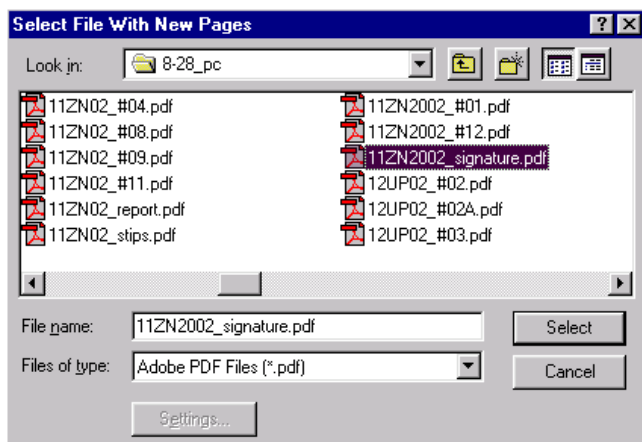
- D. Make sure that all attachments are properly labeled as "ATTACHMENT #_". Use the Free Text application if you need to add a label.



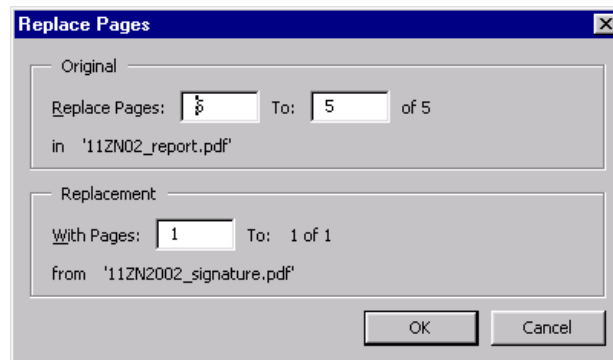
- E. If the attachments are imported in a mixed order, which they usually are, reorder the attachments to be correct (matching the report).
- Open the Thumbnails tab on the left. Pull the divider to the right to maximize your viewing tablet for the thumbnails.
 - Move the attachments to the right order by using the drag and drop method – use the shift and control keys to select multiple pages. A bold line will appear to show you where you are about to drop the page (See below).



- If you need to replace a page (i.e. unsigned signature page for signed page), this is how:
 - Open report PDF. Go to the page to be replaced.
 - In the toolbar, select Document, Replace Pages.
 - Go to the document that you want to import

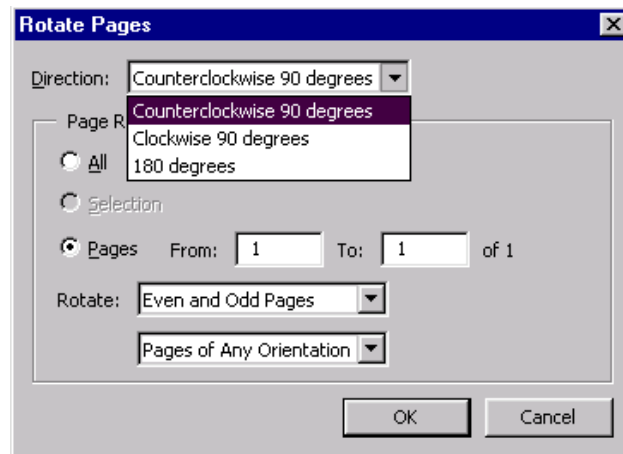
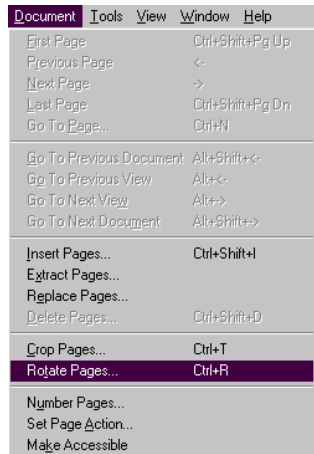


- D. Tell the program which page you want to replace and how many pages of the new document you want to import. Default is 1 page for 1 page.




3. Rotating Pages

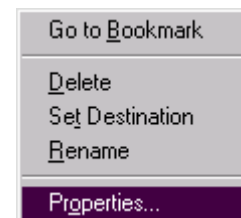
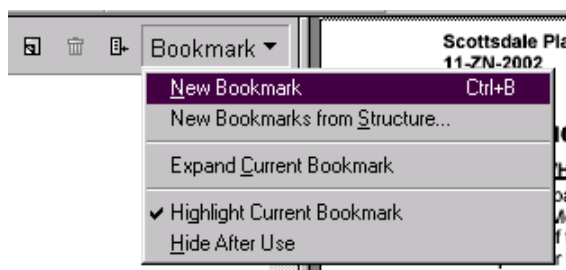
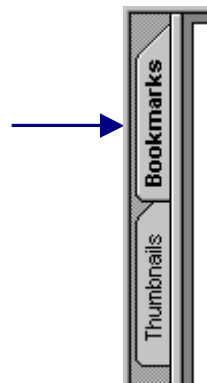
- A. Go to the page that needs to be rotated
- B. Select Document, Rotate Pages (or use the keyboard shortcut: Ctrl-R)
- C. Choose your direction of rotation
- D. Click OK
- E. It will ask if you are sure, click Yes
- F. Save



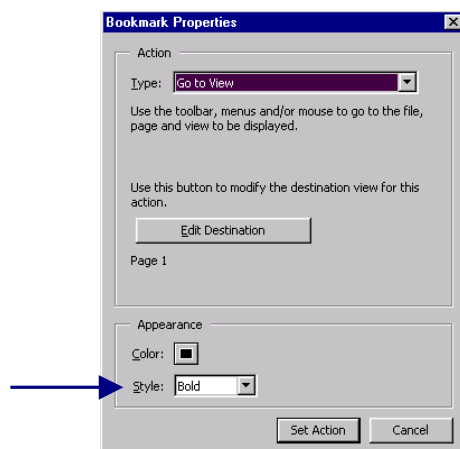
IV. SET THE BOOKMARKS, HYPERLINKS, AND DOCUMENT PROPERTIES.

1. Create bookmarks. **Save frequently to avoid any problems!**

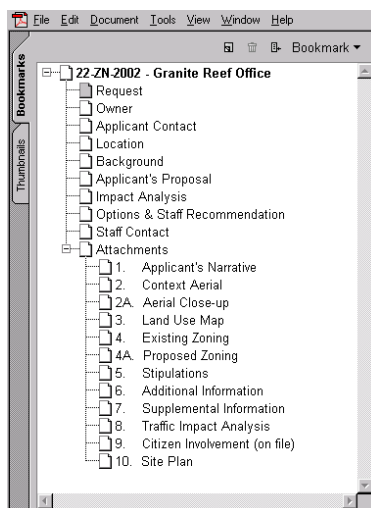
- A. Click on the bookmarks tab on the left.
- B. If you have a decent set of bookmarks by default – you're lucky. Otherwise, delete all the existing bookmarks (select the top one, hold the shift key and select the last one, then delete). *If there are any good ones, you don't have to delete them.*
- C. Start on the top of the first page and create a new bookmark.
 - i. **To create a bookmark, you MUST be on the page that you want the bookmark to link to.**
 - ii. You can create a new bookmark using several methods; use whichever is most comfortable for you. You can:
 - (1.) Click on Bookmark, New Bookmark (as shown below),
 - (2.) Use the New Bookmark button  or
 - (3.) Use the [Ctrl-B] keyboard shortcut.



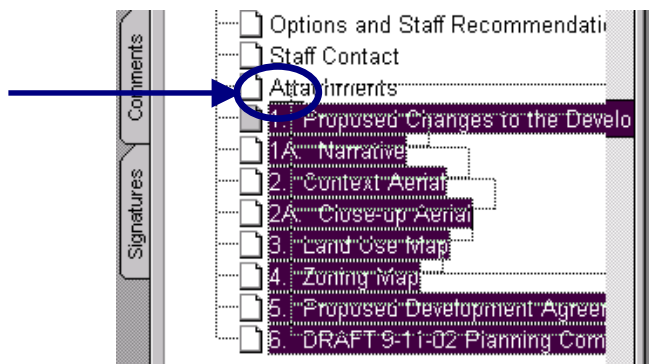
- iii. Title the first bookmark by the Case No and Name. Press Enter.
- iv. Right-click on the bookmark, and select Properties.
- v. Set the Appearance Style to **Bold**.



- D. Create bookmarks for all of the main sections of the report, and one for each attachment. Use the outline structure shown below. (Should be almost automatic with cases starting in 2003 – See section I.1.A.)

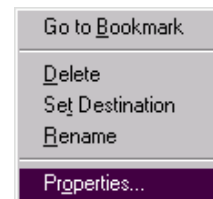


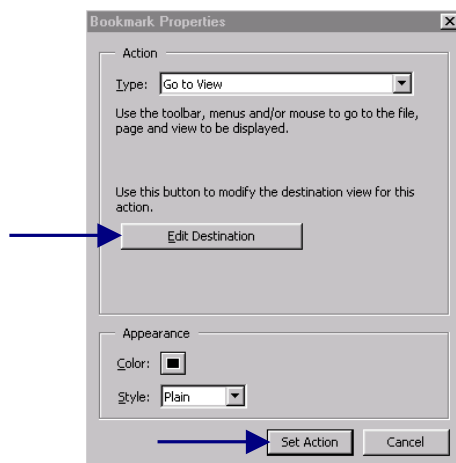
- i. To build the “tree” structure, as shown above, select the bookmarks that you want to move (use the shift key!) and drag the bookmarks to the location that you want to drop them. A line will appear to show you where they'll drop (See Below).




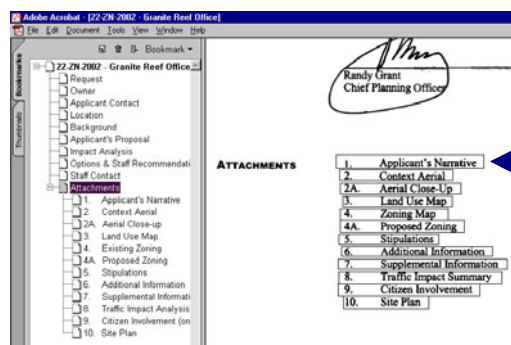
E. Verify Bookmarks

- Select the “hand” from the toolbar (resumes neutral functions)
- Click on each bookmark to verify that the location of the bookmark is set to the correct page
- If a bookmark is not set correctly, reset the destination
 - Right-click on the bookmark
 - Select “Properties”
 - Use the arrows or the page numbers to go to the correct page
 - Click on “Edit Destination” to change the bookmark destination
 - Click on “Set Action” to save your changes and close the window

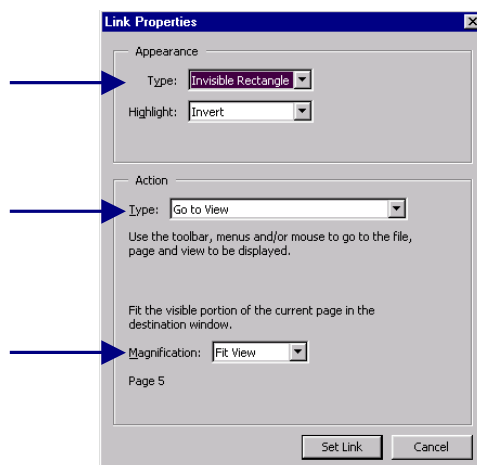




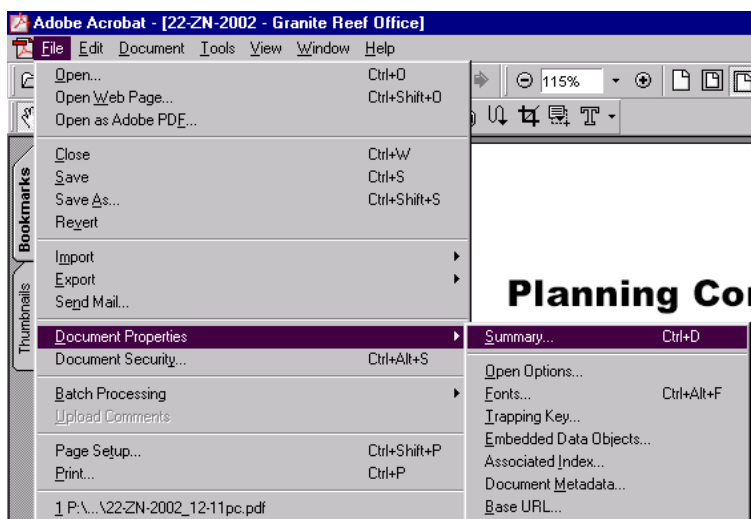
2. Create links to the attachment pages from the attachment list on the last page of the report.
 - A. Go to the last page of the report.
 - B. **Open the Bookmarks tab if it's not open already.** (That will make it easier for you to set the links.)
 - C. Select the link tool on your toolbar. It looks like a little 2-link chain. 
 - D. Draw a box around the attachment line.



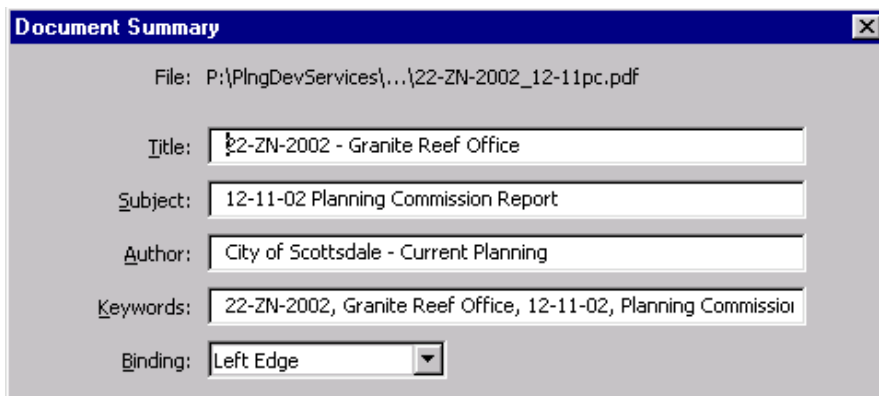
- E. In the pop-up box (see below), make sure that the appearance type is set to invisible.



- F. Set the action type to “Go To View” and the magnification to “Fit View” (which should be the default settings).
 - G. Click on the bookmark for that attachment. This will take the documents to that attachment page, but the pop-up box will remain above the page. **If you don't do this, you'll set the link to go nowhere.**
 - H. Click on “Set Link.”
 - I. The program will take you back to the attachment list on the last page of the report. Continue setting links until all attachments are done.
3. Create PDF document properties. This will create a document title, search keywords, etc.
 - A. Select File, Document Properties, Summary.



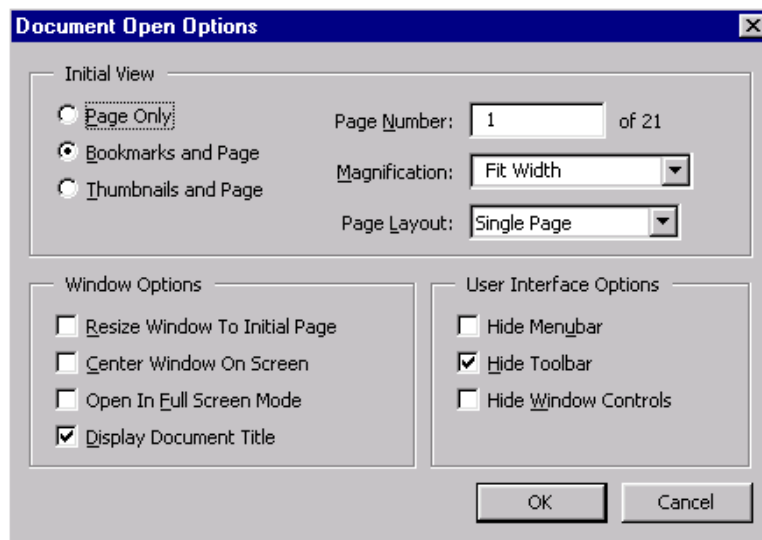
- B. Create the Summary Information as shown below:
 - Set the Title as *Case Number and Name*
 - Set the Subject as *DD-MM-YY Planning Commission Report*
 - Set the Author as *City of Scottsdale – Current Planning Services*
 - Set Keywords: *Number, Name, Planning Commission, DD-MM-YY.*



4. Set the Document's opening properties.
 - A. Select File, Document Properties, Open Options

B. Set the options as shown below:

- **Initial View settings:** Bookmarks & Page; Page 1; Fit Width; Single Page
- **Window Options:** Open in Full Screen Mode; Show Document Title
- **Use Interface Options:** Hide Toolbar



V. PREPARING FOR WEB POSTING.

1. When ALL changes/additions, etc are complete, **“Save As”** over the original file. **This will optimize the PDF for web viewing (allowing the user to “download” one page at a time rather than requiring the whole file to pull at once, which would take forever).**
2. **SAVE A COPY of the reports to the CDS Case Folder!!!**
3. Combine the contents of the packet into one file.
 - A. Set the bookmarks as shown below:
 - B. Set the links from the agenda to the reports.
 - C. Set the Document Properties and Open Options.
 - D. Save-As to optimize for web!!**
4. Save the packet, agendas and minutes in the Shared Folder (minutes and agendas will be placed as separate files in the appropriate hearing date, so they will be kept separately as well as being in the packet document):
\\PingDevShare\CurrentPlanning\WebPosting
5. E-mail Michelle Dalton that the files are ready to post--remind her where the files are (path shown above).

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Electronic Packet Checklist

Hearing Date: _____

[illegible]